Payroll Coordinator Handbook

COUNTY
of SAN LUIS
OBISPO

> “We recruit, select, develop, and support a high performing County workforce to deliver excellence in service to the community.”
>
> -Human Resources Mission Statement

Last Revised Feb. 2018

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As a payroll coordinator, you have accepted one of the most important roles in your department. Although you have many roles and responsibilities, one of the most important is that you are the liaison between employees and the Human Resources Department. Every transaction associated with an employee, from recruitment to separation and everything in between, begins with you. This handbook has been designed to help you understand the ins and outs of your role, as well as provide guidance for common tasks.

Access

To begin, you will want to confirm you have the following access. Your department will have a process for obtaining SAP Access.

SAP:

1. CATS_APPR_LITE (Approve Working Times)
2. CAT2 (Maintain Times)
3. ZHRR_PAF (Personnel Action Form)
4. PA20 (Display HR Master Data)
5. ZHRR_POSITION_STATUS
6. PT 50 (Quota Overview)
7. PT_ERL00
8. PT90
9. ZHRR_Position_Status
10. ZOMR_OM_PAL_RPT

NEOGOV:

Your Human Resources Analyst Aide can assist you with getting the appropriate access including:

1. Access to your department in Insight and Online Hiring Center (OHC)
2. OHC access as a hiring manager, Approver and HR Liaison with permissions to:
    a. Create OHC Notice Templates
    b. Send OHC Notices
    c. View Application
    d. View Personally Identifiable Info for [My Application Review] only
    e. Approver

County Email Group: PE_pyclk is an email group that the Payroll Department and Human Resources Department maintain. To ensure you are added to the email group, please contact your Human Resources Analyst Aide.

Anniversary Dates

Anniversary dates for new hire and promotions shall be the date following completion of the equivalent of six months full-time service in the class, except for those employees appointed at a step other than step one or have yearlong probations as defined in CSC Rule 11.03. In those cases, the anniversary date shall be the date following the completion of the equivalent of one year of full-time service at such step.

Annual Temp Help Renewal

- Create new agreements for temps/interns renewing into next Fiscal Year.
    - Confirm rate of pay- submit PAF as class salary range changes, as requested by supervisors/managers, or abiding by required minimum wage laws
- Separation paperwork submitted to HR for those not renewing to include exit checklist, PAF, and separation report

Applications

CSC Rule 6.01 indicates that all applications must be received by the final filing date through our electronic system, Government Jobs (www.governmentjobs/careers/slocountyca).

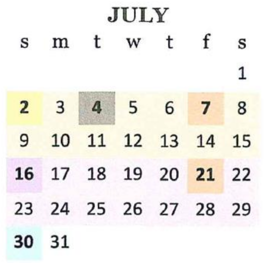
Federal and State laws require employers to provide reasonable accommodation to qualified individuals with disabilities. Please let the Human Resources Department know if an employee has self-disclosed the need for a reasonable accommodation to apply for a job.

Effective Dates

Every transaction, except separations, leave-related documents, and new hire dates, must have an effective date that falls on the beginning of the pay period. Most transactions will be dated to the beginning of the pay period, even if they fall mid-week. For instance, if a pay period begins 08/13/2017, all transactions between 08/13/2017 and 08/25/2017 will be effective 08/13/2017 (except for annual leaves which have to be processed the following pay period)

Examples:

- An employee who has an annual evaluation due on 07/19/2017. The effective date of the evaluation would be 07/16/2017, because that is the beginning of the pay period that the evaluation falls in.
- An employee is separating from the department and the last date that they are coding time is 07/07/2017. The effective date of this transaction would be 07/08/2017.



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Individual Tax Savings (ITS Enrollment) - Flexible Spending Accounts

- Communicate deadlines to employees for enrollment
    - Refer them to ESS for FSA/ITS claims process information
    - Enrollment changes during year require qualifying event and completion of ITS change form

Learning & Development Center Liaison

You are responsible for tracking appropriate completion of the following trainings at the department level:

1. AB1234 (Local Ethics Training) – requirements

Members of boards, commissions, councils, and other County bodies are required to obtain ethics training every two years if they fit into one of the following categories:

- Members who are paid a stipend per meeting or other compensation are subject to the ethics training requirement.
- County employees who serve on a board, commission, advisory board, or other legislative body in their capacity as County employees are all subject to the ethics training requirement. Similarly, department heads or designees of department heads who serve on the Subdivision Review Board are subject to the requirement.
- Other members (not County employees and who are not paid a stipend per meeting or other compensation) are subject to the ethics training requirement only if they have received, or expect to receive, expense reimbursement from the County for expenses incurred in their official capacity.

The ethics training requirement *does not* apply to members of boards, commissions, councils, etc. for whom all of the following are true: (1) they are not County employees; (2) they do not receive a stipend or other compensation for their service, and (3) they do not receive expense reimbursement from the County.

2. AB 1825 (Supervisory Harassment Prevention Training) - requirements

All County employees are required to complete one Discrimination and Harassment Prevention (DHP) training options annually. In addition by state law, any employee that supervises others are required to complete training compliant with Assembly Bill 1825 every 2 years. Supervisors are required to complete one of the other DHP training options (for a total of one hour) in the years that they do not have to complete Preventing Discrimination and Harassment (AB 1825) training.

Leaves

An employee may request leave with or without pay for reasons of illness not covered by sick leave, to attend school or training; to accept appointment in the unclassified service; to work temporarily at another governmental agency; military leave; family leave; pregnancy disability or parental bonding.

There is current Federal and State law that governs leaves of absence: The Federal Family Leave and Medical Act (FMLA), the California Family Rights Act (CFRA), and State of California Pregnancy Disability Leave program (PDL).

All requests should be in writing to the department head and should be coordinated through you. Requests in excess of twenty (20) days shall be forwarded to the County Human Resources Director by the department head for prior approval. (Failure to report back within 5 working days following expiration of leave-of-absence may constitute automatic resignation.)

Leave of Absence Coordinator

All leave paperwork is coordinated through you, as the department's payroll coordinator. Permanent County employees who have completed one year of service are eligible to apply for Family and Medical Leave.

Leave of Absence form is required when:

- An employee is not at work for 5 or more consecutive days. Prior approval should be obtained whenever possible.
- The employee will be working fewer than their allocated number of hours (i.e., Other leave of absence (not FMLA-qualifying), Leave Without Pay, Temporary Reduction of Work Schedule, Injured on Duty, CFRA or FMLA).

Leave of Absence Request Processing

1. Once the employee has completed Page 1 of the Request form, submit request to the Human Resources Department to ensure FMLA balances available for the requesting employee
    a. Email HR_Leave_Mgmt@co.slo.ca.us for employee eligibility including
        i. Employee's Full Name
        ii. Employee ID
        iii. Employee's Department
        iv. If their spouse/domestic partner also works for the County
        v. Date the leave is expected to begin
        vi. Date the leave is expected to end
    b. Eligibility or non-eligibility should be designated on leave request form

2. Ensure completion of leave of absence forms including medical certification and upper management signatures
3. Submit PAF, leave form, and medical certification (if applicable) to HR
    a. PAF effective date should be the first date the leave of absence began, and the reason field should be "leave of absence"
4. Personnel Analyst reviews and approves the form which will prompt HRAA team to enter relevant information into SAP
5. The original leave form is filed in HR
6. A copy of the signed leave form is returned to the department. The department is responsible for distributing a copy of the signed Leave Form to the employee
    a. Send Employee the leave designation letter (see HR Forms for template)
    b. If leave is not approved, the payroll coordinator discusses any alternative leave options available to the Employee
7. Follow up with employee before leave ends (at least 1 week prior to the original RTW) to ease into the return to work process and gather necessary paperwork in a welcoming manner
    a. Remind EE to submit a return to work note from their doctor indicating any work restrictions, or their ability to return to work without restrictions.
        i. In this case, notify your Personnel Analyst to coordinate next steps which may include an interactive process meeting
8. Once Employee returns, submit Return to Work or Leave Extension depending on employee needs
9. If employee does not come back, work with Personnel Analyst to begin interactive process to discuss accommodations, reduced work schedule, etc.

Proper Completion of LOA Form

The leave of absence request form should be completed as follows:

- Top right-hand corner:
    - Date – The date the form is submitted by the employee
- Check the box for either Original Request or Extension Request
    - Original - First Leave form submitted for this qualifying request
    - Extension - Subsequent Leave form(s) submitted to extend leave for same reason
- Name - Name as shown on PAF
- Emp # - As shown on PAF
- Dates of Leave - An actual date is required for both starting date and anticipated return date

- Department - Use department name (not division)
- Checkbox that applies to indicate reason for the leave of absence - If you have any questions about the type of leave, please contact Human Resources
- Other Leave of Absence (non-FMLA): Submit a memo or email justifying why the leave of absence is approved by the department and is in the best interest of the County. This memo must be submitted by the Department Head for approval by Director of Human Resources or Designee
- Include Due Date for Pregnancy Disability Leave and Date of Birth for Bonding Leave
- Timecard Coding: Be sure this section has been complete to indicate how paid hours during the leave are to be coded. When coordinating with Worker's Compensation, contact Risk Management for assistance. If there is SDI coordination, contact the Auditor's Office for benefits information
  - Time quota balances can be obtained via SAP transaction PT50
- Obtain employee and department head's signatures
- Complete leave eligibility hours available on page 2 of the request form, and submit to HR

Return to Work

Submit a Notice of Return to Duty and a PAF before or on the day the employee returns to duty. The PAF effective date should be the day that the Employee returns to work.

- Doctor's release - If employee has been on any type of leave, the department should obtain a form from the treating physician releasing the patient/employee back to duty (restrictions noted, if any).

Note: The employee must be working their full-time equivalent hours for the Return to Work to be processed. If employee is not returning to full-time equivalent, please see instructions under "Employee Returns to Reduced Work Schedule" or "Request for Extension."

Bilingual pay and Stipends

- When going on leave: Bilingual differential pay will be removed if the employee is on leave for more than two consecutive weeks. To remove the Bilingual Differential, simply cross off the recurring payment amount on the PAF.
- When returning to duty: If the Bilingual Differential was removed, it should be reinstated on the PAF unless the employee's job duties have changed. Normally the department does not need to submit a new request to reinstate. However, in the case of extended/lengthy leaves, a new request may be appropriate because overall departmental bilingual coverage requirements may have changed.

Request for Extension

- A new Request for Leave of Absence form is needed every time there is a need for an extension, or if the leave designation changes (Pregnancy Disability ends and Bonding begins, Work Comp Not Concurrent, ADA Accommodation, etc.) _
- Protected leave expiration - Human Resources notifies the Payroll Coordinator when an employee has exhausted all protected leave.
- Send a new Leave form to Human Resources so the leave designation may be updated as appropriate.

Employee Returns to Reduced Work Schedule

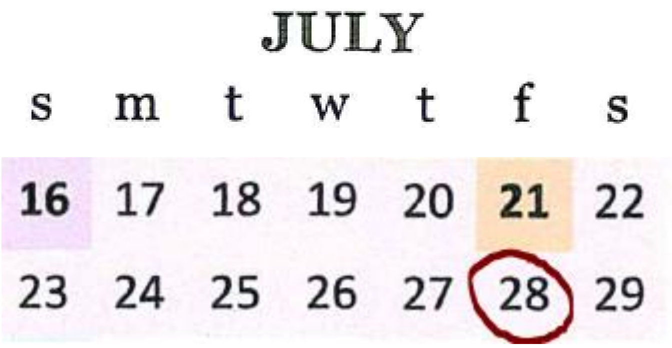
- Send new Request for Leave of Absence form completed with reason and justification for approval by HR Director/Designee.
- Do not submit a Return to Duty form if the employee is working a reduced work schedule.

Return to Duty Effect on Evaluation Date when EE on Leave

Leave hours may change the employee's next evaluation due date. The coding of accruals and Leave Without Pay affects hours attributed to completion of evaluation hours. The evaluation due date will be extended until the employee has worked enough hours to receive their next evaluation.

Payroll Deadlines

Every Personnel Action Form (PAF) must be received by the Human Resources Department by the Friday before payroll week for it to be processed within that pay period. For example, if you are processing an employee performance evaluation for the date of 07/16/2017 it has to be to the Human Resources Department by 07/28/2017.



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If the PAF is not received by this deadline, the employee is at risk of not getting their paperwork processed in time to see changes made. In most cases, this is negative for the employee as most Performance Evaluations are support to compensation increases.
*Annual Leave paperwork must be received before the payroll start date to process. In the example above, the PAF would need to be received before July 14 to be effective July 16.

Promotions

- CSC rule oversight (list management, proper step placement designated on PAF, etc.)
- Competitive
    - Employees who have established permanent status may apply for promotions county-wide and to promotional opportunities within their department
- 5.05a
    - Notify your HRAA when an application has been submitted
    - Approval by department/ supervisor that EE is performing at satisfactory level or above AND supports the promotion should be attached to the employee's application
    - Submit PAF once approved by HR to complete promotion

Step Placement at Promotion

Promotion is defined as "advancement from a position in one class to a position in another class which has a higher pay range." - CSC 2.36

Per Ordinance Section 2.48.34(5): "Any general management, operations and staff management, or confidential (excluding attorney classes) employee who is promoted shall receive a salary in the new salary range so as to provide **no less than five percent (5%)** increase in pay over the pay previously received; provided however, that such increase shall not exceed the highest salary of the range allocated to the new classification."

Advanced Step Placement

Each department may set the salary of management employees at any step within the range for the classification. The step placement must be justified by submitting a memo to Human Resources outlining the reasons why the advanced step placement is warranted. Justification must be based on merit and performance.

Recruitments

Requisitions

When a position is to be filled, you should create a requisition to prompt HR to open the recruitment or certify an existing eligible list. Ensure all pertinent information is completed in the requisition.

- Recruitment Coordination- Work with the analyst, hiring manager(s), and HRAA's to schedule steps in exam process, ensure screeners and raters are assigned, and set up department interviews.
- Position Control

  The vacancy report shows every open position and designated position number. It is extremely important to ensure the integrity of this list. If we open recruitments when positions are not available, or double fill a position, we are putting the department budget at risk. Before opening a requisition, you should pull the vacancy report and determine the position to be filled in the requisition. The process for pulling the vacancy report in SAP is below.

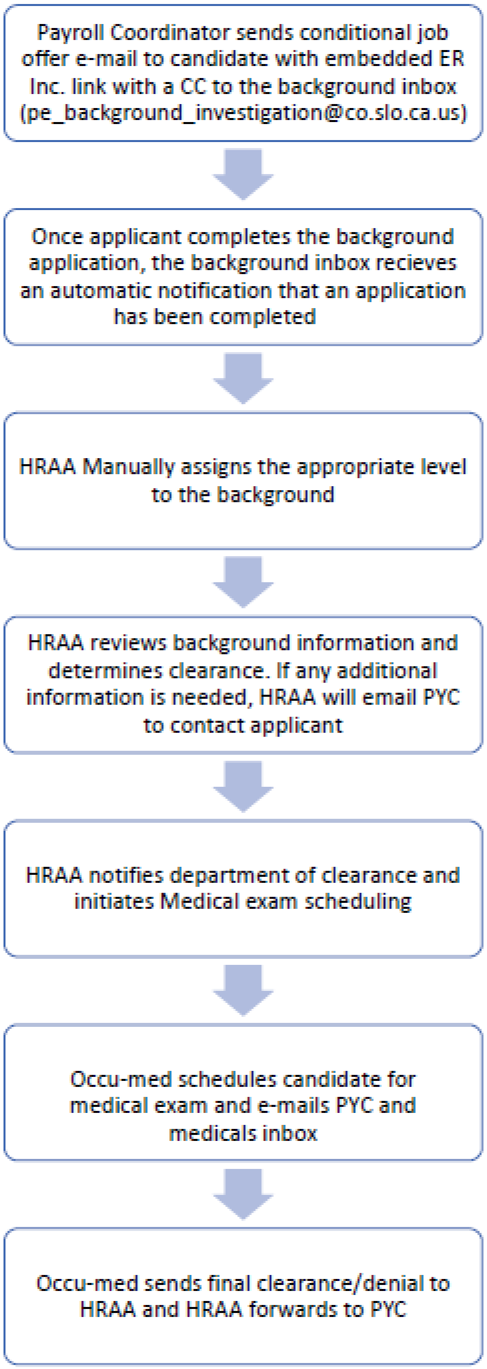
  1) Transaction: ZHRR_POSITION STATUS
  2) Plan Version: 01
  3) F8 (execute)

Proper Use of Certified Eligibility

The Human Resources department will certify a list with the names and ranking of 9 plus the number of current vacancies, unless fewer than 10 candidates pass the panel interviews in which event you will receive all eligible candidates. (ex. If you have two vacancies, you will receive 11 eligible candidates from the list)

  - A department interview MUST be conducted for all candidates that are certified

Preplacement Process for New Hires



Payroll Coordinator sends conditional job offer e-mail to candidate with embedded ER Inc. link with a CC to the background inbox (pe_background_investigation@co.slo.ca.us)

Once applicant completes the background application, the background inbox recieves an automatic notification that an application has been completed

HRAA Manually assigns the appropriate level to the background

HRAA reviews background information and determines clearance. If any additional information is needed, HRAA will email PYC to contact applicant

HRAA notifies department of clearance and initiates Medical exam scheduling

Occu-med schedules candidate for medical exam and e-mails PYC and medicals inbox

Occu-med sends final clearance/denial to HRAA and HRAA forwards to PYC

Onboarding Process Post Pre-Placement

- E-mail your designated HRAA to have the NEOGOV onboarding checklist sent to the employee
  - Follow up with employee to ensure that there are not any outstanding questions and that paperwork will be completed **prior** to the first day of work.
- Schedule a time for new employee to come in to address questions, finish new hire paperwork, and take picture for their ID badge (if applicable).
- Ensure all documents and tasks are complete and uploaded in NEOGOV on the employee's first day of work. (This allows for the HRAA team to hire the employee in SAP the week of hire so that the EE can have access to time sheets, Outlook, etc.)
- Schedule New Employee Orientation through the Learning & Development Center by contacting LDC's HRAA in the HR department: 805-781-5959

Please note that each department and role may have various other requirements, such as a live scan, before a candidate may be offered a position

New Hire (Non-Management Employees)

Ordinance 2.48.030 - Administration of the compensation plan: "… employees of the county who by resolution of the Board of Supervisors are designated as non-management when entering the employ of the county shall be paid at the first step of the salary range established for their classification. "

Advance Step Placement at Time of Hire

- In cases where it is difficult to secure qualified personnel, or if a candidate possessing unusual training, experience or qualifications is available, the Human Resources Department may recruit and a person may be hired at step two, three, four or five of the salary range if authorized in the following manner:
  - Step 2 or 3: The County Administrative Officer authorizes on an administrative basis
    - Department emails Administrative Analyst and CC HR Analyst
  - Step 4 or 5: The Board of Supervisors may authorize the recruitment or hiring at any step of the salary range

New Hire (Management/Confidential employees)

Ordinance 2.48.034- Administration of Management and Confidential Compensation Plan: "Determination of salary…for confidential employees (excluding attorney classes), operations and staff management employees and those general management employees other than appointed department heads and elected officials shall be made as follows: A department head may set the salary received by his/her general management, operations and staff management or confidential (excluding attorney classes) employees at any point within the salary range. The salary shall be set after an evaluation based on merit and performance."

**Placement for management and confidential is usually made at step 1 of the salary range established for the classification.

Advanced Step Placement

Additional paperwork required: Each department may set the salary of management employees at any step within the range for the classification. The step placement must be justified by submitting a memo to Human Resources, outlining specific reasons why the step placement is warranted. Justification must be based on merit and performance.

Required Paperwork Checklist

- Permanent Employee Onboarding- NEOGOV
- Substitute
  - Preplacement Background and Medical
  - Same onboarding paperwork as permanent employee (if new to the county)
- Temporary Employee Onboarding- NEOGOV
- Contract Employee
  - Preplacement Background and Medical
  - Copy of Board approved contract with agenda date and item number
  - Same onboarding paperwork as temporary employee
- 5.05(a) Promotion
  - Application
  - Departmental/supervisor approval (EE attaches to application)
  - PAF
- Promotions
  - Application
  - Preplacement Medical if job duties require

  - Confirmation Job Offer Letter
  - Appointment Acceptance
  - Call Pension Trust if changing bargaining group for new percentage amount which should be entered on PAF
  - Stop SLOCEA union dues/ bilingual pay (if applicable)
  - PAF
- Provisional
  - Application
  - Preplacement Background and Medical
  - Confirmation Job Offer Letter
  - Appointment Acceptance
  - Memo from Department Head to HR Director addressing circumstances
  - Provisional Appointment Acceptance form signed by candidate
  - PAF
- Reinstatement
  - Preplacement Medical and Background (if necessary)
  - Confirmation Job Offer Letter
  - Appointment Acceptance addressing circumstances
  - PAF
- Annual Leave
  - Annual Leave enrollment/cancellation form
  - PAF
- Re-hire (Re-entry)
  - Preplacement Medical and Background
  - Confirmation of Job Offer Letter
  - Appointment Acceptance
  - Memo from Department Head to HR Director
  - PAF
- Student Intern Onboarding- NEOGOV
  - Include class schedule of 8 units/ 12 semester or quarter
- Termination
  - Separation Report
  - Letter of Resignation (from EE)
  - Exit Checklist
  - Exit Questionnaire (have the employee complete online)
  - PAF
- Election Assistant (temp)
  - Application

  - Employment Eligibility Verification
  - Loyalty Oath
  - PAF
- Transfers (Same class, different department)
  - Application
  - Requires memo to be completed by the receiving department, signed by transferring employee and Department Head of new department.
    - Template can be found on intranet, or click here
  - Preplacement Medical if job duties require
  - PAF (to be obtained from EE's current department)
    - Note: effective date must be the beginning of a pay period
- Volunteer
  - Authorized County Driver/ Emergency Information Applicant
  - Preplacement Medical and Background
- Bilingual Differential
  - Bilingual Justification Form
  - PAF
- Change in FTE
  - Memo re: allocation change signed by Department Head and EE
  - PAF
- Voluntary Reduction
  - Application
  - Preplacement Medical and Background
  - Requires HR's approval and memo addressing action between both affected departments, signed by current Department Head and employee
  - PAF
- Reclassifications
  - PAF

Timecards

- Reminders- send weekly email to department staff to ensure timecards are submitted every Friday by 12:00 PM
- Ensure timesheets for people on leaves of absence are submitted every Friday by 12:00 PM
  1) SAP transaction: CAT 2 (Time sheet entry)
  2) Enter personnel number or search by name
  3) (F5) Enter times & save

- Coordinate with payroll division to ensure employees coordinating with SDI are appropriately coded
- Any EE's out on catastrophic leave should be coordinated with HR's Benefits Analyst: Ashleigh Szkubiel 805-781-5959

Step Placement at Promotion

Ordinance Chapter 248.030 (C): "Any non-management employee who is promoted to a classification with a higher pay range shall be placed on the step of the range allocated to the new classification which would grant such employee an increase in pay nearest to five percent but not less than four percent (4%) over the pay previously received by the employee…"

Advanced Step Placement

Additional paperwork required: A non-management employee can be given an advanced step placement at the time of promotion at the discretion of the department head, if approved by the County Administrative Officer as long as the step is in the salary range of the class. Submit a request in writing to the Administrative Office, justifying the advanced step placement for the employee to be promoted based on their job performance. Upon approval, Human Resources completes processing of the promotion.

Performance evaluation

- Ensure proper step placement
- Evaluation reports
    - NEOGOV- utilize filters
    - SAP transaction: PT_ERL00- run date as Saturday preceding week in which payroll has run. The most accurate data will be obtained if you run the report the Monday after payday.
    - Adjust dates in NEOGOV accordingly based upon PT_ERL00 report
    - Set up notifications in NEOGOV to ensure evaluation processed immediately upon completion (optional, and highly encouraged).
    - Upon completion, send PAF to HR for processing

Step Increases Relating to Time in Service

Step increases are based on number of hours worked:

- Equivalent of one year of full-time service = 2080 paid hours
- Equivalent of six months of full-time service = 1040 paid hours

Step Increases of Management and Confidential Bargaining Unit **:**

Ordinance Section 2.48.034 - Administration of Management and Confidential Plan "The determination of an amount of salary within the discretion of the

department head and may remain fixed or be increased not withstanding a satisfactory or better evaluation. The salary may be reduced after an improvement needed or unsatisfactory evaluation.”

Step advancement for management/confidential is usually patterned after those given to non-management. However, step advancement is not restricted the same way as non-management. Steps can be awarded early, or reduced due to below satisfactory evaluations, at the discretion of the department head.

NOTE: Please consult your assigned Personnel Analyst prior to reducing the salary of a management/confidential employee.

Evaluation dates are set in the same manner as non-management classes. However, the dates are adjusted in the event of a step increase that is given prior to the regular anniversary date.

Anniversary Dates

- If an employee is hired at step one, the anniversary date is the date following the equivalent of six months’ full-time service
- If an employee is hired at a step other than one, the anniversary date is the date following the equivalent of one year full-time service
- Anniversary dates will be in intervals equivalent to one year of full-time service

Salary Step Increases Non-management classes:

Ordinance Chapter 2.48.030 (a) - Administration of the Compensation Plan: “ … Salary step increases, as provided for in this section, are not automatic, but based on satisfactory performance and service. Service shall mean all regular hours worked, and all approved time off in a permanent position. Such employees shall be placed on the step and qualifying for increase in compensation or advancement to the next higher step of the pay ranges in the manner following:”

Chapter 2.48.030 (A1-4):

- Employees may qualify for advancement to the second step after completion of the equivalent of six months’ full-time service, upon the recommendation of the department head and approval by the County Human Resources Director.
- Employees may qualify for advancement to the third step after the completion of the equivalent of one year of full-time service in step two, upon recommendation of the department head and approval by the County Human Resources Director.

- Employees may qualify for advancement to the fourth step after completion of the equivalent of one year of full-time service at the third step, upon recommendation of the department head and approval by the County Human Resources Director.
- Employees may qualify for advancement to the fifth step after completion of the equivalent of one year of full-time service in step four, upon recommendation of the department head and approval by the County Personnel Director

Note: Employees in non-management classes can only be given a step increase by following the process described above.

Tuition Reimbursement

Employees may qualify for reimbursement related to books, tuition, fees or other required course materials as they relate to the employees job, training, and education. Reimbursements for such expenditures are for approved coursework for the current fiscal year period submitted prior to the last day of the fiscal year end. Reimbursements vary and are dependent upon bargaining unit and availability of funds.

Request for Employee Process

1. Initiating the request prior to enrolling in a course or purchasing reimbursable item
2. Attain department head approval that the coursework or item is job-related along with attachment of completing related information:
    a. Copy of the enrollment documents
    b. Course title
    c. Date(s) of course
    d. Location of course
    e. Organizing body
    f. Current residence or personal mailing address
3. Submit a completed form to Risk Management PRIOR to enrolling in course or purchasing item. Risk Management will log your reimbursement request and if the request is approved will sign and return the original to the employee
4. Employee must pay approved cost
5. Complete course at a “passing” (C or above) level
6. Submit reimbursement request with proof of satisfactory completion and proof of payment to the Human Resources Department Attn: Risk Management

Reinstatement

Reinstatement is at the discretion of the hiring department. Reinstatement has to be done prior to the one year anniversary of the employee’s separation date. Employees cannot reinstate if they have been rejected from probation or terminated for cause.

Per Ordinance 2.48.060 A: “Reinstatement of a former permanent employee may be at a step within the range of a classification identical or comparable to his former classification which will restore him to the relative step level held at the time of resignation…”

This document is intended to be a guide for department Payroll Coordinators in their Human Resources and timekeeping roles. By no means is it inclusive of every function demonstrated by those at the departmental level. Should further assistance be needed beyond what is found in this handbook, please contact the Human Resources Department at: 805-781-5959.